


## 457(b) Plan Transaction Request Form

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 Austin, TX 78746  
 457@tcgservices.com  
 P: 800.943.9179 F: 888.989.9247

**Please submit completed form via fax, email or mail**  
**Sections A-D must be complete for processing**

A. INFORMATION ABOUT THE PARTICIPANT (OR BENEFICIARY IF DEATH CLAIM)			
Full Name		Social Security #	
Street Address		Date of Birth	
Apt/Bldg #		Contact Phone	
City, State, Zip		Contact Email	
EMPLOYER (Through which you had this account)		Nonresident Alien?	<input type="checkbox"/> YES <input type="checkbox"/> NO
	Would you like to receive status updates of your request via text message? <i>Message &amp; Data rates may apply</i>	<input type="checkbox"/> YES <input type="checkbox"/> NO	
		Mobile Phone #	

B. REASON FOR DISTRIBUTION		FILL IN <u>ONE</u> REASON ONLY	
<input type="checkbox"/> No Longer Employed by Employer Listed Above	Date of Separation:		
<input type="checkbox"/> Death of Participant	<i>Please provide Death Certificate; subject to further review</i>		
<input type="checkbox"/> Required Minimum Distribution	<i>Participant is age 70 ½ or older and is separated from employer</i>		
<input type="checkbox"/> Transfer to Purchase Service	<i>Please submit a form showing the public pension plan that funds are being transferred to</i>		
<input type="checkbox"/> Permanent & Total Disability of Participant	Date became Disabled:		
<input type="checkbox"/> Unforeseeable Emergency	<i>Complete Verification Form or Appendix A (See following forms)</i>		
<input type="checkbox"/> Other :	<i>Must qualify under plan and tax rules</i>		

C. DISTRIBUTION INSTRUCTIONS			
<input type="checkbox"/> Cash Distribution <i>Other than Unforeseeable Emergency</i>	<input type="checkbox"/> Check box for partial withdrawal of: <i>Do not check for full distribution</i>	\$	
All or a portion of your distribution is eligible to be rolled over into another retirement account. Please review the attached Special Tax Notice. If you choose the cash distribution option, a mandatory 20% (30% for nonresident aliens) federal income tax withholding will be deducted from your distribution. Federal law requires the automatic Federal income tax withholdings for cash distributions over \$200. The distribution check will be made payable to you and will be mailed to the address provided above.			
<input type="checkbox"/> Qualified Rollover or Transfer (IRA, 403(b), 457(b), 401(k), 401(a), etc.)	Please complete the section below with the receiving institution's information, or submit a letter of acceptance along with this form to TCG. Funds cannot be sent without the receiving institution's information.		
Complete this section to complete a Rollover of funds	Name of Receiving Institution		
	Street Address of Institution		
	City, State, Zip		
	Receiving Account/Contract #		
	Type of Account you are sending funds to: (IRA, 403(b), 457, etc.)		

Unforeseeable Emergency withdrawal request is on the following page.

A signature is required on the following page. Electronic signatures will not be accepted.



<input type="checkbox"/> <b>Unforeseeable Emergency Distribution</b> <i>Must submit the Verification form</i>	Amount Requested:	\$
	If you choose this option, 10% federal income tax withholding will be deducted from your distribution unless you elect a different tax percentage below: <input type="checkbox"/> Do not withhold any taxes. I will pay my taxes when I file my US Tax Return <input type="checkbox"/> I elect to withhold federal income taxes at the rate of twenty percent (20%)	

**D. ACCEPTANCE AND AUTHORIZATION (PLEASE SIGN BELOW)**

By my signature below, I represent that I am the owner of the account listed above and authorize the distribution of assets as indicated. I understand that my account will be charged a distribution fee of **\$30.00**, and if my account balance is less than the distribution fee, I will not receive any money.

<b>Signature of Participant</b> (or Beneficiary if Death claim)		<b>Date</b>	
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NOTE: If additional contributions are received after a final distribution has occurred, TCG Administrators will process the second request exactly as specified on this form and an additional distributions fee will be charged.